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CIRCULAR NO. 14.

United States Department of Agriculture.

SECTION OF FOREIGN MARKETS.

[Under the immediate supervision of the Secretary of Agriculture.]

HAMBURG AS A MARKET FOR AMERICAN PRODUCTS.

Hamburg ranks as one of the foremost trading cities of the world, its commercial importance being due in large measure to the position it occupies as a distributing center in northern Europe for commodities brought from other parts of the globe. In 1895, the latest year for which official returns are available, its combined import and export trade reached the enormous value of \$1,265,951,414, a decided increase over the preceding years. The value of the merchandise imported into Hamburg by sea and by land, as well as that received from the United States, during each of the five years 1891 to 1895, inclusive, is shown in the following table:

Imports into Hamburg during the years 1891 to 1895, inclusive.

Calendar years.	Imports by sea.	Imports by land.*	Total imports.	Imports from the United States.	
	<i>Dollars.</i>	<i>Dollars.</i>	<i>Dollars.</i>	<i>Dollars.</i>	<i>Per cent of total.</i>
1891	362, 092, 864	296, 060, 807	658, 153, 671	40, 303, 979	6. 12
1892	354, 424, 909	265, 968, 387	620, 393, 296	52, 308, 059	8. 45
1893	370, 537, 233	278, 735, 237	649, 272, 470	42, 103, 085	6. 48
1894	372, 721, 992	258, 269, 556	630, 991, 548	47, 114, 923	7. 47
1895	395, 421, 078	233, 504, 143	678, 925, 221	47, 441, 989	6. 99
Annual average, 1891-1895...	371, 039, 615	276, 507, 626	647, 547, 241	45, 854, 407	7. 08

* By rail and by the upper Elbe.

The value of the merchandise exported from Hamburg by sea and by land, and also of that shipped to the United States, during the above-mentioned years was returned as follows:

Exports from Hamburg during the years 1891 to 1895, inclusive.

Calendar years.	Exports by sea.	Exports by land.*	Total ex-ports.	Exports to the United States.	
	<i>Dollars.</i>	<i>Dollars.</i>	<i>Dollars.</i>	<i>Dollars.</i>	<i>Per cent of total.</i>
1891	308, 311, 112	271, 515, 315	579, 826, 427	47, 624, 126	8. 21
1892	285, 082, 217	265, 583, 510	550, 665, 727	36, 556, 764	6. 64
1893	307, 339, 674	265, 855, 354	573, 195, 028	39, 597, 478	6. 91
1894	289, 072, 242	270, 622, 236	559, 694, 478	28, 765, 308	5. 14
1895	318, 152, 043	268, 874, 150	587, 026, 193	32, 114, 340	5. 47
Annual average, 1891-1895...	301, 591, 458	268, 490, 113	570, 081, 570	36, 931, 603	6. 48

* By rail and by the upper Elbe.

In view of Hamburg's commercial importance, as indicated by the statistics given above, the facts and suggestions relative to our trade with that city presented in the annexed report of United States Consul W. Henry Robertson are of special interest. The report in question was received through the medium of the State Department in response to a circular letter of inquiry issued by the Secretary of Agriculture. It is dated at Hamburg, October 22, 1895, and reads as follows:

REPORT OF CONSUL W. HENRY ROBERTSON.

[NOTE.—The following commercial abbreviations are used in the report: C. f. = cost and freight; c. f. i. = cost, freight, and insurance; and f. o. b. = free on board.]

Cattle.—According to the statistics of the administration of markets, 112,000 head of cattle were imported into Hamburg in 1894, of which possibly 70,000 were consumed in the city and its neighborhood. The others were to a great extent slaughtered and shipped by outside dealers to the industrial districts of the interior of Germany. To show to what extent the consumers depend on importations for their supply, it may be said that of the 112,000 head imported in 1894, 66,000 came from Denmark, 8,000 from the United States, 900 from Sweden, 450 from Great Britain, and 10 from Africa, while only the remaining 36,600 were of German raising. The cattle are sold here alive, and at present the prices per 110 pounds (meat weight) are about as follows: Oxen (prime), \$14.25 to \$15; steers (according to quality), \$11.40 to \$12.80; cows (according to quality), \$10 to \$12.80. The cattle from the United States are very popular with the butchers here, and the animals that came from there last year were of prime quality, so that the highest prices were brought by them. The consumers were also very much pleased with the meat, and I am therefore convinced that the permission to import American cattle again would, except by the Agrarians, be hailed with general delight. It will be remembered that their importation into Germany was recently forbidden on the ground that several head had been found to be suffering from Texas fever.

Considering the fact that our cattle are looked upon with such great favor here, and, if of good quality, command the best prices, it would appear that no efforts on the part of our Government to induce the German authorities to rescind these prohibitive measures ought to be spared. The demand is considerable, and the facilities for transportation offered by the Hamburg-American Line's five large new cattle steamers are most excellent.

Horses.—Exact figures for the consumption of horses are difficult to obtain. Six horse fairs are held here annually, at which from 10,000 to 12,000 horses are offered for sale. Most of them come from the adjoining provinces of Schleswig-Holstein, Hanover, and the Grand Duchy of Mecklenburg, while not a small number are imported from Denmark. Lately about 150 to 200 head of horses have been arriving here per week from the United States. They are of the heavy working class, and appear to promise to become very popular, particularly as this breed is not raised in Germany. They command good prices. The recent adoption of the electric system of street railways in this city in place of the former horse cars has destroyed a very considerable demand for stout draft horses.

Sheep.—There were 106,000 head of sheep marketed here last year, which were almost exclusively of German origin. Most of them were consumed in Hamburg and its neighborhood. The rest were shipped in a slaughtered condition to England. The average price is about 14 cents per pound of meat weight.

Mules.—There is no demand and consequently no market for mules here.

Wheat.—The consumption of wheat is extensive and the consumers are dependent upon importations to the extent of about 60 per cent. During 1894, most of the imported wheat came from Argentina and Russia, while the importations from the

United States showed a marked decrease, owing principally to the fact that prices there were too high. Besides, the Argentine wheat has grown very much in favor owing to its excellent qualities. The product is sold per ton of 2,200 pounds. The average prices last year were \$21.40 to \$23.80 per ton for Russian; \$22 to \$24.50 per ton for Argentine, and \$26 per ton for American.

It is generally believed that our high prices are in a great measure due to the heavy future speculations in New York and Chicago, and that in view of the great supply they were hardly warranted. Through the milling industry, which in the last ten years or more has assumed such large proportions, the situation in the United States has changed considerably. The principle which this industry follows consists chiefly in trying to get control of as much wheat as possible, so that it can turn all the more into flour for exportation. As far as the better grades of wheat are concerned, it has apparently succeeded, for few of them are offered, and then only at extremely high figures. The grades that are exported have grown worse every year, so that our red winter wheat is hardly considered better than some of the hardly desirable German qualities. It is a well-known fact that before Argentina came into consideration as a wheat-exporting country, and when the quality of our own wheat was better than it is now, England was largely dependent upon the United States for her wheat, and in order to bring about a change in these conditions it encouraged wheat growing in India, a country which now belongs to those importing the article.

Indian corn or maize.—As a rule importations of this cereal are considerable, Germany being almost entirely dependent upon importations which it makes from the United States, Argentina, Russia, and the countries along the Danube. The average price last year was \$21.50 to \$26 per ton of 2,200 pounds, the American product being the most expensive. Owing to these high prices in the United States, very little corn was imported from there into Germany. The crops in Argentina were, generally speaking, a failure and Germany was compelled to satisfy its demands as best it could by importations from Russia and the countries along the Danube.

Oats.—Importations of oats are of little consequence, small quantities of fancy grades only being imported from Sweden and northern Russia. Prices range from \$20 to \$25 per ton of 2,200 pounds c. i. f.

Flour.—The consumption of flour is not of great importance and consumers do not have to depend upon importations, as Germany does her own milling of the wheat which she imports. Those shipments that do arrive here are principally of American origin and generally consist in consignments which, owing to the overproduction in the United States, are invariably sold at figures which can hardly pay the exporters. These shipments, to be sure, are as a rule of the lower grades. The high duty of about \$2.50 per 220 pounds in Germany is another reason why only the best qualities can be marketed here at anything like a fair profit. The Hungarian flour is the only flour demanding higher prices than our own, and these prices vary between \$3 and \$4 per 220 pounds c. i. f.

Meal (oat or corn).—The consumption is not great and the importations are of small importance, as far as I can learn.

Glucose and starch.—Both of these are important articles, but owing to the high German duty little or none is imported.

Cheese.—The consumption is considerable, Germany itself, Holland, France, and Switzerland furnishing the greatest quantities. The importations from the United States are almost nil. I am told, however, that our full cream cheese could be sold here if the price were lower. Owing to the enormous variety of cheeses marketed here it is impossible to give any average prices.

Butter.—Hamburg and Copenhagen are not only the most important but also the leading markets in this product, especially with regard to the whole of northern Europe, excepting Russia alone. Official exchange quotations are published once a week, both in Hamburg and Copenhagen, and these influence directly the markets of north Germany, Denmark, Scandinavia, Holland, and particularly Great Britain. Hamburg itself consumes about 200,000 pounds of butter per week, while very large

quantities are required to provision its merchant marine. Hardly a country that is dependent upon its milk and butter production is not now and then obliged to ship butter to this market. The largest importations come from Schleswig-Holstein, Mecklenburg, and Hanover, while much is also imported from Russia, Holland, Finland, Galicia, Australia, and the United States.

In 1893 the lowest price for good average butter was 22 cents per pound, and the highest about 30 cents per pound. In 1894 the lowest figure was 20 cents and the highest 28 cents. American butter brings the lowest price and this in the face of the best possible shipping facilities and the low freight of 48 cents per 110 pounds. According to the opinion of the principal butter dealers, Hamburg appears to be regarded by the American dealers as a good dumping ground for the old stocks which are unsalable in the United States. In consequence such a decided aversion to our butter has gained ground that, even when better grades are shipped, this prejudice costs the importer about 2 cents per pound, or, in other words, this butter brings 2 cents per pound less than the identical quality from other countries. This prejudice can only be set aside by regularly made better shipments. The American butter is generally tallowy or mildewed and often not genuine butter of good grain or body, but so-called ladles—that is, butter mixed with old qualities and containing as much salt and water as the product will absorb. Besides, our butter is too highly colored for the European taste. All these defects have tended to cause the opinion here that the American manufacturers can not make good butter at all.

Fresh meats.—In north Germany the consumption of fresh meats is considerably greater than it is in south Germany, but taking it all in all, the consumption per capita in Germany is much smaller than it is in the United States and Great Britain. The consumers do not depend upon importations, but when they have been made, the meat has come principally from the United States and Australia. At present all importations of fresh meats from the United States are prohibited in Germany, and this prohibitive measure is attributed to the pressure brought to bear upon the Government by the Agrarian party. Australia still ships fresh meats in a frozen condition to this port, but as far as I can learn the business has not proved profitable.

Canned meats.—The consumption is considerable, although not as great, for instance, as in England. Consumers are dependent upon importations. The United States and Australia furnish the greatest quantities. The American goods bring full prices, and appear to give no cause for complaint. The Australian goods are said to be far inferior to the American. The trade in American canned beef and tongues is especially valuable.

Bacon and hams.—The consumption is considerable, and, generally speaking, consumers are dependent upon importations. This year enormous quantities of pigs have been raised in Germany, so that importations may fall off in consequence. The major portion of the supply comes from the United States. Denmark furnishes large quantities of hams and Russia a great deal of bacon. The average price for hams is about \$9.75 per 110 pounds in bond, and that for bacon about \$7.85 per 110 pounds in bond. Danish hams bring higher prices than the American ones, while American bacon is quoted higher than that from Russia. Our examiners of hams and bacon should exercise the greatest care in making their examinations for trichinosis.

Lard.—The consumption is very great, and consumers are obliged to import from 50 to 75 per cent of their supply from the United States. Importations from Hungary are made only when the price of the American article is too high. The average price is about \$7.50 per 110 pounds, American lard being relatively cheaper than that of other origin. It would appear that American lard is often adulterated with cottonseed oil and other fats, and whenever this is ascertained to be the case, capital is made out of it by the German Agrarians. It is therefore to the interest of our trade with Germany that such adulterations be strictly avoided.

Oleomargarin.—Large quantities of this article are imported into Hamburg from the United States, Australia, Argentina, and France. Nearly 75 per cent of the raw material required here is imported. It is the principal ingredient of margarin

butter, one of the largest factories of which is located near Hamburg. Oleomargarin commands an average price of \$9.50 net per 110 pounds, but of late has been selling at \$8.20 net and lower. The American article is the most expensive, and is, as far as I can ascertain, not adversely criticised in any way.

Raw cotton.—The consumption of raw cotton in Germany is very considerable, and consumers are entirely dependent upon importations which they receive from the United States, East India, Egypt, Peru, etc. Most of the American and East India cotton arrives at Bremen, where the most important German cotton exchange has its seat. For several years Hamburg has also boasted a cotton exchange, but the business done is very small compared with that done at Liverpool and Bremen. There are no cotton spinners in the Hamburg consular district. The principal German spinneries are in the Rhine district, in Alsace, and in Saxony.

The qualities of the cotton dealt in are so manifold and the fluctuations so frequent that it is almost impossible to give reliable quotations as to price. There are no special criticisms of the American cotton, but there are very severe criticisms of the baling, to which I have referred in a previous report to the Department of State. (See United States Consular Reports, Vol. XLVIII, No. 176, May, 1895, pp. 13-19.)

Cotton seed.—This article, I am told, is imported only in very small quantities.

Cotton-seed oil.—The consumption is considerable, the article being extensively used in margarin factories and lard refineries. Importations are necessary from the United States and to a small extent from Egypt. Prices vary considerably, from \$10 to \$13 per 220 pounds. The American article brings top prices. Criticisms of our cotton-seed oil are not made.

Oil cake.—Only small importations of oil cake appear to be made.

Cottolene, etc.—Cottolene is not dealt in to any extent, but the United States, when lard prices are high, exports large quantities of compound lard to this port, the prices of which vary daily.

Cotton-seed meal.—Although not specially mentioned among the articles to be reported upon, I will not fail to give a few points upon cotton-seed meal, which is extensively imported into Hamburg in bags and in bulk, and shipped from here to the interior of Germany, where it is used as a cattle fodder. Consumers are not exactly dependent upon importations, but when prices are not too high large shipments arrive here from America. The price fluctuations are great. In December, 1894, it was quoted at \$19 per ton of 2,200 pounds, and in March, 1895, at \$20.42 per ton. The quality of the American article appears to give general satisfaction.

Unmanufactured tobacco.—Germany grows comparatively very little tobacco, and consumers are therefore almost entirely dependent upon importations. The following table shows the quantities imported into Hamburg during 1893 and 1894, and the countries of origin:

Country of origin.	1893.	1894.	Country of origin.	1893.	1894.
Havana.....serons..	16,000	20,000	Paraguay.....packages....	1,000	3,000
Yara and Guisa.....do....	1,400	13,000	Mexico.....do.....	6,600	8,000
Cuba.....do.....		4,300	Java and Sumatra.....do....	18,500	22,000
Santo Domingo.....packages..	166,000	81,000	Esmeralda.....do.....	2,000	1,200
Puerto Rico.....do.....	2,100	2,500	Seed leaf.....cases..	6,900	3,500
Varinas.....baskets..	100	500	Kentucky, Virginia, Ohio, etc.,		
Colombia.....packages..	8,500	8,700	hogsheads.....	4,200	4,500
Annuana, etc.....do.....	100	1,200	Hungary.....packages..	2,800	2,100
Brazil.....do.....	228,000	98,000	Ukraine.....do.....	500	1,000
Rio Grande.....do.....	300	4,500	Turkey and Greece.....do....	9,000	10,000

Seed leaf is only imported from the United States and is in good demand locally. Round lots vary in price from 6 cents to 10½ cents per pound, according to condition and quality, and command better prices than the tobacco from Santo Domingo, which in some cases is used as a substitute for seed leaf. The seed leaf imported into Hamburg is said to have two disadvantages. Its ashes split and fall off too easily, and

the tobacco itself is generally much too damp and sometimes even wet. Besides, the large wooden cases of nearly half a ton measurement in which the tobacco is packed cause heavy storage and warehouse charges, a circumstance which has caused most dealers to discontinue carrying it in stock. It is believed that if the tobacco were packed in bales weighing about 200 to 220 pounds it would become more popular. The greatest drawback, however, is that the tobacco is not uniformly packed, which makes the drawing of samples from each and every case necessary, thus causing unnecessary, heavy expenses. It is suggested that it be carefully assorted and packed in bales which could be classified about as follows: (a) Full bunches or binders, (b) medium bunches or binders, (c) good fillers, and (d) medium fillers, so that each class of a lot would be represented fairly by one sample. Seed leaf is not used here for wrappers.

Manufactured tobacco.—There is a very considerable consumption of manufactured tobacco in Germany, as the following figures of the importations into Germany for consumption will show:

	1880.	1892.	1893.	1894.
	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>
Cigars	834, 680	783, 860	804, 320	635, 740
Cigarettes	54, 120	254, 320	286, 880	314, 380
Chewing tobacco	37, 840	53, 300	63, 800	59, 180
Snuff	33, 220	38, 060	32, 560	26, 620
Smoking tobacco	814, 440	1, 126, 400	1, 014, 640	1, 065, 020

According to these figures only the importation of cigarettes has increased to a marked extent. This increase may be solely ascribed to the growing demand for Egyptian cigarettes, which is now much greater than that for the Russian manufacture, as the following statistics demonstrate:

Importations from—	1888.	1894.
	<i>Pounds.</i>	<i>Pounds.</i>
Russia	36, 300	64, 680
Egypt	23, 540	164, 560

Only about one-half of the cigars imported come from Havana. The greater part of the other half is of Dutch origin, with an average value of \$13 per mille, in bond. Last year the importations of cigars from Cuba show a decrease of about 92,400 pounds, as compared with 1893, owing to the tariff war between Germany and Spain. Of the 1,065,020 pounds of smoking tobacco imported in 1894, 924,000 pounds came from Brazil alone.

Tobacco juice.—Another article of no small importance is tobacco juice, derived principally from Virginia and Kentucky tobacco, and used to a considerable extent for the manufacture of chewing tobacco in Bavaria. There were imported of this article in 1880, 102,520 pounds; in 1892, 1,087,900 pounds; in 1893, 1,236,400 pounds; and in 1894, 1,315,600 pounds.

For the years 1891, 1892, and 1893 the average importations of cigars, according to the countries of origin, were:

	<i>Pounds.</i>		<i>Pounds.</i>
Austria	62, 700	West Indies	421, 520
Switzerland	22, 200	The rest of America	13, 420
Belgium	46, 820	Other countries	34, 100
Netherlands	156, 220		
East India	30, 040	Total	799, 340
United States	12, 320		

The average importations of cigarettes for the same years were:

	<i>Pounds.</i>		<i>Pounds.</i>
Russia	49,720	United States	19,800
Austria	31,460	Other countries	19,580
France	13,200		
Africa	112,200	Total	245,960

Fresh fruits.—There is a considerable consumption of oranges, lemons, apples, pears, plums, etc., and for the first three of these fruits consumers depend partly or entirely upon importations. Oranges are imported from Spain, Sicily, Florida, and the Orient, lemons from Italy, and apples from the United States and Canada. All fresh fruits are sold here at public auction. American oranges and apples bring higher prices than the fruits from other countries or those of home growth. American pineapples and bananas are also imported. The former are not so well liked as those from San Miguel, while the latter are always easily disposed of at good prices. During the season of 1893-94 there were imported from Spain 205,124 boxes of oranges, and from Sicily 200,260 boxes of oranges and lemons, while in the season 1892-93 the importations were: From Spain 133,252 boxes of oranges, and from Sicily 183,174 boxes of oranges and lemons. Owing to the tariff war with Spain only about 22,000 boxes were imported from there during 1894-95, while Italy shipped about 275,000 boxes. A box of Spanish oranges weighs about 150 pounds, and a box from Italy about 77 pounds, or about the same as our American boxes. In 1893-94 about 1,500 boxes of Florida oranges were imported. If the latter arrive in sound condition, they sell at good prices, especially as they can be placed upon the market here before the Spanish and Italian oranges are ripe.

American apples, especially Baldwins and pippins, are very popular, and if they could be delivered somewhat cheaper, would, in my opinion, compete strongly with the German fruit. On the average about 10,000 barrels are imported annually. Our fine peaches are not found in this market, which is probably due to the fact that they can not stand the long ocean voyage.

Dried fruits.—The principal dried fruits consumed and imported here are apples, raisins, and currants. By far the greatest quantity of the former is of American origin. These apples are either evaporated or sun-dried. Our evaporated apples, which had always been in good demand, have of late lost in favor. Dealers ceased to import them in any large quantities, owing to constant examinations of the goods by the police authorities to ascertain whether they contained zinc. It is probably due to this fact and the various reports from this and other United States consulates that our manufacturers have lately begun to use wooden instead of zinc frames and to agree to abide by the analyses of the German chemists. The apples which have since arrived and have been evaporated on wooden frames have been found to contain no zinc, but are not as fine in appearance as those of former shipments. In the beginning of 1894 prices were as high as \$12.15 for 110 pounds, while toward the close of the year they had receded to \$8.50 per 110 pounds. The average price for American sun-dried apples was \$7.60 to \$8.30 per 110 pounds. The importations amounted to about 30,000 boxes and 5,900 pounds in 1894, 26,300 boxes and 8,100 pounds in 1893, 38,500 boxes and 10,200 pounds in 1892.

Raisins are imported from Turkey, Persia, and Spain. The importation from Turkey in 1894 amounted to 240,000 boxes and 150,000 bags, and that from Spain to 700 barrels and 7,000 boxes. None were recorded from Persia in 1894.

Prices last year were extremely low, prime Vourla Sultana and Eleme raisins selling as low as \$1.40 per 110 pounds.

Currants, which are derived almost entirely from Greece, were also very cheap. Prices ranged from \$1.40 to \$1.90 per 110 pounds. The importations were 19,740,000 pounds in 1893 and 9,200,000 pounds in 1894.

Canned fruits.—Owing to the almost prohibitive duty of \$14.23 per 220 pounds gross for net, canned fruits are not imported to any extent. The consumption, how-

ever, in articles of home manufacture is great. The largest factories are in the Brunswick district, and their wares are considered to be very good in quality and flavor.

Nuts.—The only edible nuts imported in large quantities are almonds, which come from Italy, Spain, Portugal, Africa, Persia, and the Orient. About 5,500,000 pounds are imported annually. Prices vary considerably. In 1894 the lowest was \$6 per 110 pounds, and the highest \$12.60 per 110 pounds.

Wines.—The consumption of this article is very considerable, not alone in this city, but also for the commerce with the interior and with foreign countries.

In 1890 there were imported from France, 2,608,232 imperial gallons; from Spain, 905,190 imperial gallons; from Portugal, 682,582 imperial gallons; and from Italy, 435,710 imperial gallons; making a total of 4,631,714 imperial gallons, valued at \$6,218,000. I have been unable to obtain exact figures for the year 1894, but it is safe to say that they are considerably greater than the above, especially as exceptionally large quantities of the fine and rich vintage of 1893 were imported from France. The principal business of the Hamburg wine trade is done in French, Spanish, and Portuguese wines, and as Germany produces none that could be used in their stead, consumers are obliged to depend entirely upon importations for these qualities. The average prices are as follows:

Bordeaux wines, per 263.75 gallons f.o.b. at Bordeaux	\$154.40
Sherries, per 131.87 gallons f.o.b. at Cadiz	97.20
Huelva, per 131.87 gallons c.f. at Hamburg	28.56
Tarragona, per 139.78 gallons f.o.b. at Tarragona	47.60
Benicarlo, per 118.70 gallons f.o.b. at Benicarlo	28.56
Port wines, per 137.10 gallons f.o.b. at Oporto	145.80
Portuguese clarets, per 263.75 gallons f.o.b. at Lisbon	61.75
Marsala, per 110.75 gallons f.o.b. at Marsala	72.90
Barletta, per 22 imperial gallons c.i.f. at Hamburg	6.43
Dalmatian, per 22 imperial gallons c.i.f. at Hamburg	8.57

The prices for American wines are relatively higher than those paid for similar products, such as certain Portuguese wines, Barletta, and Dalmatian. California clarets bring about \$7.60 to \$8.33 per 22 gallons c.i.f. Hamburg. When used within the customs district they are at a disadvantage as compared with similar products from Italy and Austria, as for blending purposes the former pay a duty of \$4.76 per 220 pounds, while the latter pay only \$2.38 per 220 pounds. It is said that the American wines nearly all possess a peculiar flavor which is not liked here, and that they are therefore not as well adapted for blending purposes as Italian and Austrian wines. With the American the Bordeaux flavor is said not to be obtainable.

Brandies.—The consumption of brandies and similar liquors is quite extensive, and for the better qualities consumers must depend entirely upon importations, principally from France and Great Britain. The French products that arrive here are almost altogether Cognac brandy, while those from Great Britain are whiskies, both Scotch and Irish. Very large quantities of American whisky were formerly imported into Hamburg, but of late these importations show a marked decrease. Only exceedingly small quantities of this whisky were sold and consumed here of course. After having been stored here several years they were reexported to the United States. They were not shipped here for sale, but simply to allow them to mature, and in the meantime to escape our own internal-revenue tax. Spirit dealers have given it to me as their opinion that it is not unlikely, however, that our whiskies will before long be more largely consumed, and to-day there is already established in this city a branch house of one of the largest whisky firms in New York, which is using its best efforts to introduce more generally the American article. There are several very large factories in Hamburg which manufacture very large quantities of cheap brandies, gins, and other spirits for export. Most of these goods go to Africa, Australia, East India, etc., and naturally their quality is a very inferior one.

Beer.—The consumption of beer is very great, but very little is imported. The little which is imported consists of English ale and porter. American beers are very much higher in price than the domestic and other German beers. The best Munich beers retail here at 6 cents per bottle containing a little less than 1 pint, while very good domestic beers cost only 2½ cents per bottle. Beer of American manufacture is hardly known here, but those Germans who have visited the United States and drunk our best beers there do not seem to care for them.

Cider.—The consumption of cider is small, and consumers do not have to depend upon importations at all. Good cider (not sweet) can be had at retail for 15 cents per three-fourths of a quart.

Clover seed and other grass seeds.—In Hamburg and immediate vicinity there is very little consumption of these articles, but Hamburg is the largest and most important market on the European Continent for all grass seeds. The chief supply comes from the United States, Canada, Russia, Austria-Hungary, and, to a small extent, from France and Italy. The American seed is generally sold in German currency per 110 pounds (gross for net) c. i. f. Hamburg, payment sight drafts against documents in Hamburg. Some of the Western States sell in cents per American pound delivered in New York, payment against documents in New York. The prices vary greatly, according to the crops. Our seeds are from 10 to 20 per cent cheaper than similar products from other countries, which is said to be due to the fact that they are not as hardy as other foreign seeds, and that the grass grown from them is too fuzzy. The dealers do not believe this view of the Agrarians to be true.

Flaxseed.—The consumption of flaxseed is not very great and consumers depend only to a small extent upon importations. These arrive from Russia and India, the latter product being used for the manufacture of oil.

In concluding a report of this nature, I feel that it can not be amiss to earnestly try and impress upon United States producers of agrarian products especially the necessity of improving and in every way maintaining the quality of all articles that are intended for export to Germany. A very little observation in this country is required in order to see that it is solely through the employment of strictly scientific methods in both the production and preservation of farm products, either raw or manufactured, and through the rigid avoidance of waste in any direction, that farmers here—who in most cases are not land owners, who are heavily taxed, who have small acreages, and whose implements and methods of work are often antiquated—are yet able to compete successfully with importations from abroad and to live with their families in comfort, if they do not grow rich.

A technical education in youth, which so few of our farmers have enjoyed or seem to care to give their sons, enables the German farmer to obtain the most tasteful, nutritious, and substantial results from the soil with the least injury to it, while a keen competition has taught him that every leaf and every root represents just so much money, and as such is not to be wasted. It is not an uncommon sight in Europe to see the members of a family gathering by hand the strands of hay and grass which have been left in the field or yard after a careful use of the rake or mower, and one is almost obliged to conclude that one of the chief secrets of the success of the European farmer is his tendency to save every blade of grass he raises, in contrast to the costly waste which is so largely evident on United States farms. Our farmer may well lay such a lesson to heart. I do not presume, however, to more than hint at these features in passing; but in regard to importations intended for Germany, I desire to enjoin the greatest care upon our farmers and exporters that they so raise, prepare, and ship their goods as to allow no opportunity for complaints against them in any direction. Above all, they should be thoroughly healthful. When sold by sample or upon conditions of analysis, they should fully conform to both.

Already Germany debarb our cattle, fresh meat, and green plants of every sort, such as sweet and Irish potatoes, grape vines, flowers, etc., and has recently raised serious

questions against our canned goods and dried fruits; so that now so many annoyances, restrictions, and expenses attend the importation and examination of these farm and food products that dealers are obliged in many instances to avoid them altogether.

Whether such restrictions on our imports are due to a commercial unfriendliness toward the rival products of the United States, or to the political exigencies of the Imperial Government, or to genuine defects and dangers in the articles themselves, it is certainly true that for gaining a natural access to German markets through popular demand for what is best and cheapest, or for procuring unimpeded entry of our products through diplomatic intervention, our position can only be so much the stronger and more advantageous as the grounds for reasonable complaints, of whatsoever nature, against our exports disappear.

When our farmers shall have realized and acted upon the necessity of cheapening the process of marketing their wares by constructing better roads on European principles, and shall have adopted the aids of science toward attaining for their products, whether animal or vegetable, a combination of the greatest quantity, substance, flavor, and purity, and shall have determined that nothing which they grow or breed is to be allowed to be wasted, then will they have succeeded in removing some of the more perplexing impediments to a successful competition with foreign producers, not only in foreign markets, but in their own.

The publications heretofore issued by the Section of Foreign Markets are as follows:

Bulletins (to be procured at the prices indicated from the Superintendent of Documents, Union Building, Washington, D. C.):

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No. 2.—The German Empire. Price, 5 cents.

No. 3.—France. Price, 5 cents.

No. 4.—Canada. Price, 5 cents.

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Circulars (for free distribution. Apply to the Secretary of Agriculture, Washington, D. C.):

No. 1.—Peaches and Other Fruits in England.

No. 2.—American Dried Apples in the German Empire.

No. 3.—Imports and Exports for 1893 and 1894.

No. 4.—An Example for American Farmers and Dairymen.

No. 5.—The Treaty of Shimonoseki between China and Japan of April 17, 1895, and Our Possibilities of Trade with those Countries.

No. 6.—Imports and Exports for 1893, 1894, and 1895.

No. 7.—Extension of Markets for American Feed Stuffs.

No. 8.—The Manchester District of England as a Market for American Products.

No. 9.—Imports and Exports for 1893, 1894, 1895, and 1896.

No. 10.—Course of Wheat Production and Exportation in the United States, Canada, Argentina, Uruguay, Russia, and British India from 1880 to 1896.

No. 11.—Agricultural Products Imported and Exported by the United States in the Years Ended June 30, 1892 to 1896, Inclusive.

No. 12.—Sources of the Principal Agricultural Imports of the United States during the Five Years Ended June 30, 1896.

No. 13.—Distribution of the Principal Agricultural Exports of the United States during the Five Years Ended June 30, 1896.

WASHINGTON, D. C., *March 2, 1897.*